



Path to Value Methodology

Create a Value Plan

Path to Value Kickstart 2.0

Digital VE Team

Path to Value – Kickstart 2.0



4 weeks Instructor-Led Training Program with the aim to enable you in our best practices and methodologies towards realizing value and getting your team ready to exploit Celonis capabilities.



Week 1 (1st Tuesday of the month)	Week 2	Week 3	Week 4	Week Effort
Create a Value Plan 1 hour Zoom Session Tuesday 5 pm CET				1-2 hour Submit Value Plan 1.0
	Frame Value 1 hour Zoom Session Tuesday 5 pm CET			2-4 hours Submit Value Plan 2.0
		Realize and Sustain Value 1 hours Zoom Session Tuesday 5 pm CET		1-2 hours Submit Value Plan 3.0
			Enablement Plan 1 hour Zoom Session Tuesday 5 pm CET o	1-2 hours Submit Enablement Plan

Characteristics

Only by Invitation – Free & Live
Repeated every Month

A group of customers in the same classroom

Badge Credential (after submission of Value Plan)

1:1 Follow-up to review Value Plan

What are you going to learn?

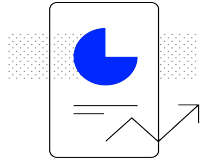
Week 1: Intro to Celonis EMS and Value Methodology + Value Plan creation

Week 2: Frame Value: Identify inefficiencies & calculate cash value

Week 3: Realize & Sustain: Define actions and solutions for those inefficiencies

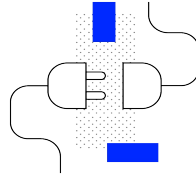
Week 4: Academy, Community, and Support

Key Aspects for Success



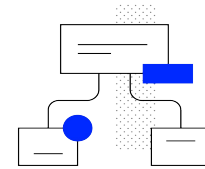
Value Realization

Value Plan
Frame Value
Realize Value
Sustain Value



Adoption & Enablement

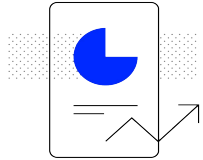
Training/Enablement Plan



Change Management

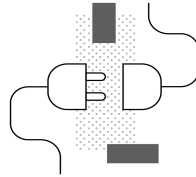
Center of Excellence

Key Aspects for Success



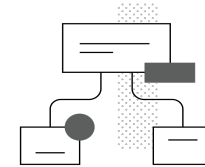
Value Realization

Value Plan
Frame Value
Realize Value
Sustain Value



Adoption & Enablement

Training/Enablement Plan



Change Management

Center of Excellence

Path to Value Methodology (By Steps)



Part 1 – Value Plan: Define your scope of interest, objectives & use cases and Create a Value Plan

1. Write your Strategic Initiatives
2. Select your Process Roadmap
3. Select your Business Priorities
4. Select the Use Cases where you believe there is potential for improvement
5. From Use Case to Business Case Definition (Theory)
6. Document your Use Cases Backlog (Value Overview)

Part 2 – Frame Value

7. Confirm & Identify inefficiencies
8. Identify Root Causes of those inefficiencies
9. Calculate the Business Impact of each inefficiency
10. Complete each Business Case (use case, root cause, and business impact)

Part 3 – Realize & Sustain

11. Define an Action Plan per Use Cases/Business Case
12. Status Report of the Action Plan
13. Track the Business Value generated across all Business Cases (Value Tracker)
14. Monitor Value for each Business case directly in Celonis

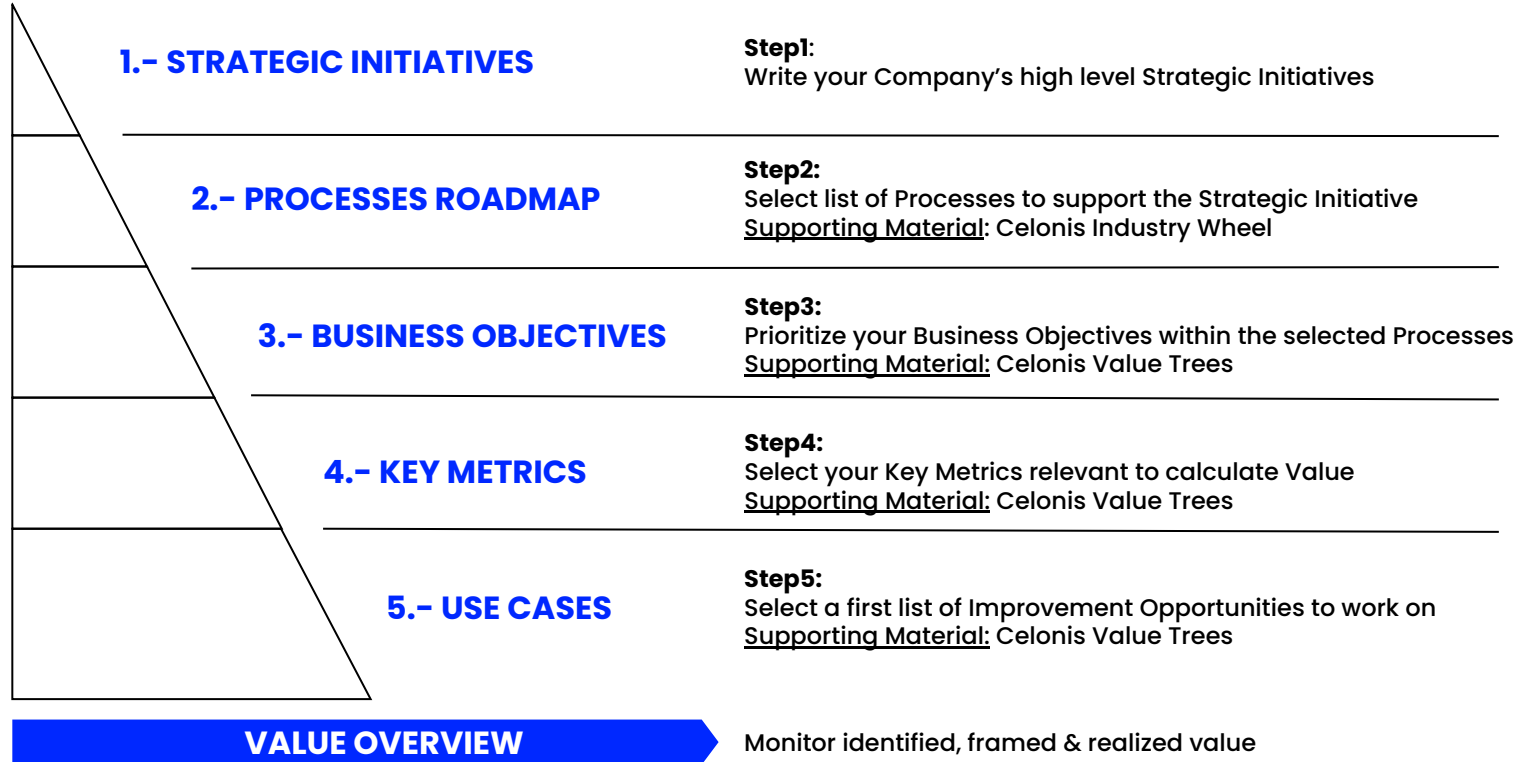


Part 1

Create your Value Plan 1.0

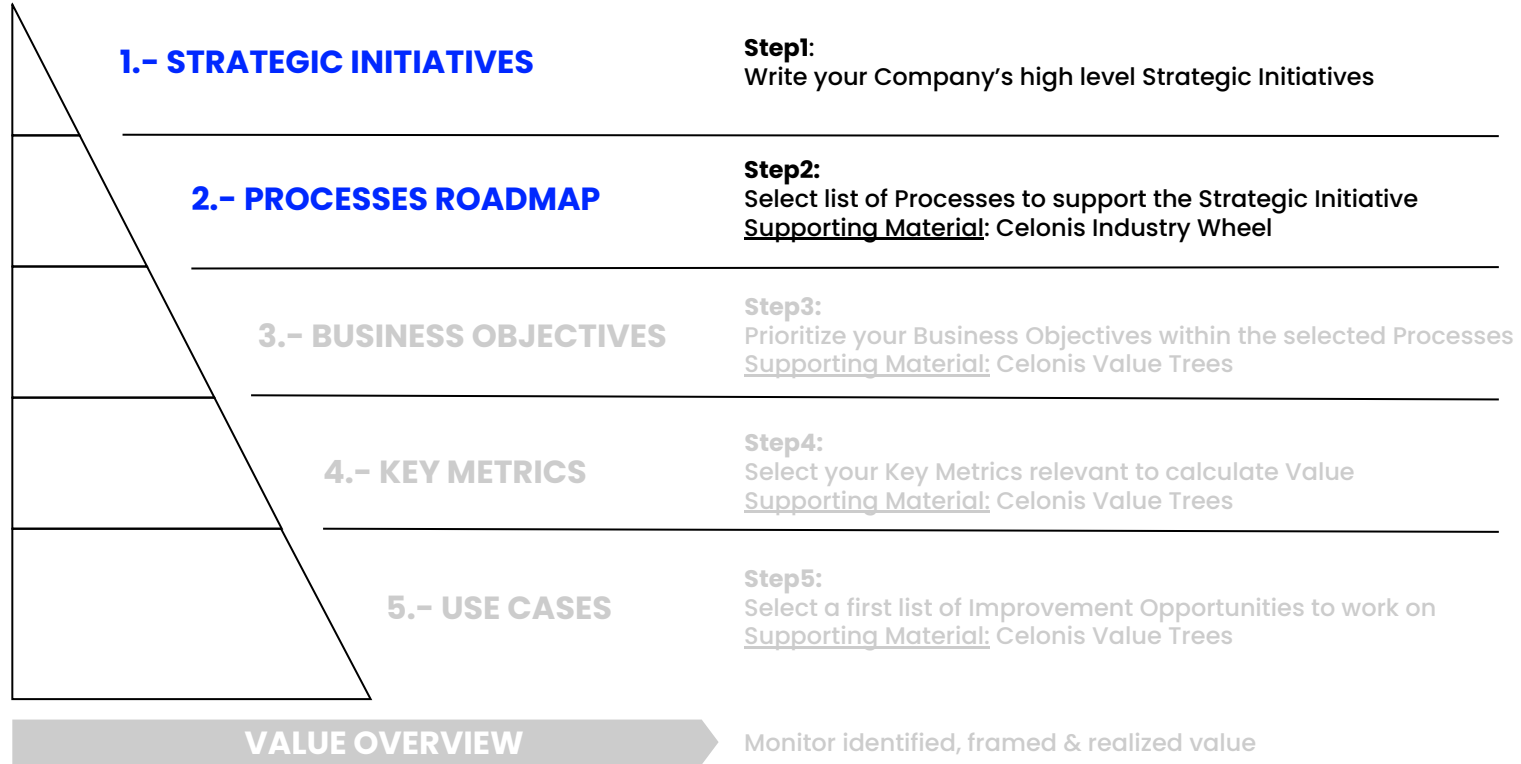
Value Plan

A first Value Plan, consist in the definition of the following topics



Value Plan

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Strategic Initiatives & Process Roadmap



1.- Define your Strategic Initiatives (as a company)

Open the Value Plan Template: [HERE](#)

This is your working document for the coming slides. Write your company strategic initiative in it.

Strategic Initiatives C

Example

Company XYZ

Objective 1: Productivity & Operational Excellence Initiatives to improve labor productivity and reduce operational costs

Objective 2: Customer Experience Initiatives to improve customer experience and satisfaction. Differentiate from competitors and improve NPS score.

Objective 3: Efficiency in Sales Increase win deals numbers in the team, via a solid methodology and reducing administrative tasks.

Celonis Material/Templates helps in guiding our conversation. Should never act as a limitation.

2.- Select your Industry from Celonis Industry Wheels

Industry Wheels: [HERE](#)

Find your industry wheel (Industry wheels contains the most common processes supported by Celonis)

Update your Value Plan by copying and pasting your Industry wheel.

3.- Select your Processes Roadmap

Mark in blue the process or processes you will implement in the first phase.

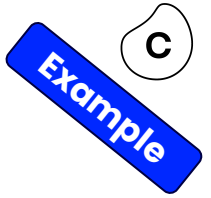
Mark in light blue the processes you could implement (or plan to) in coming phases.

Process Roadmap (Example: Logistics) C

Example

Celonis Industry Processes
 Wheel-Quick-Wins planned for 2022
 Planned 2023

Strategic Initiatives



Company XYZ

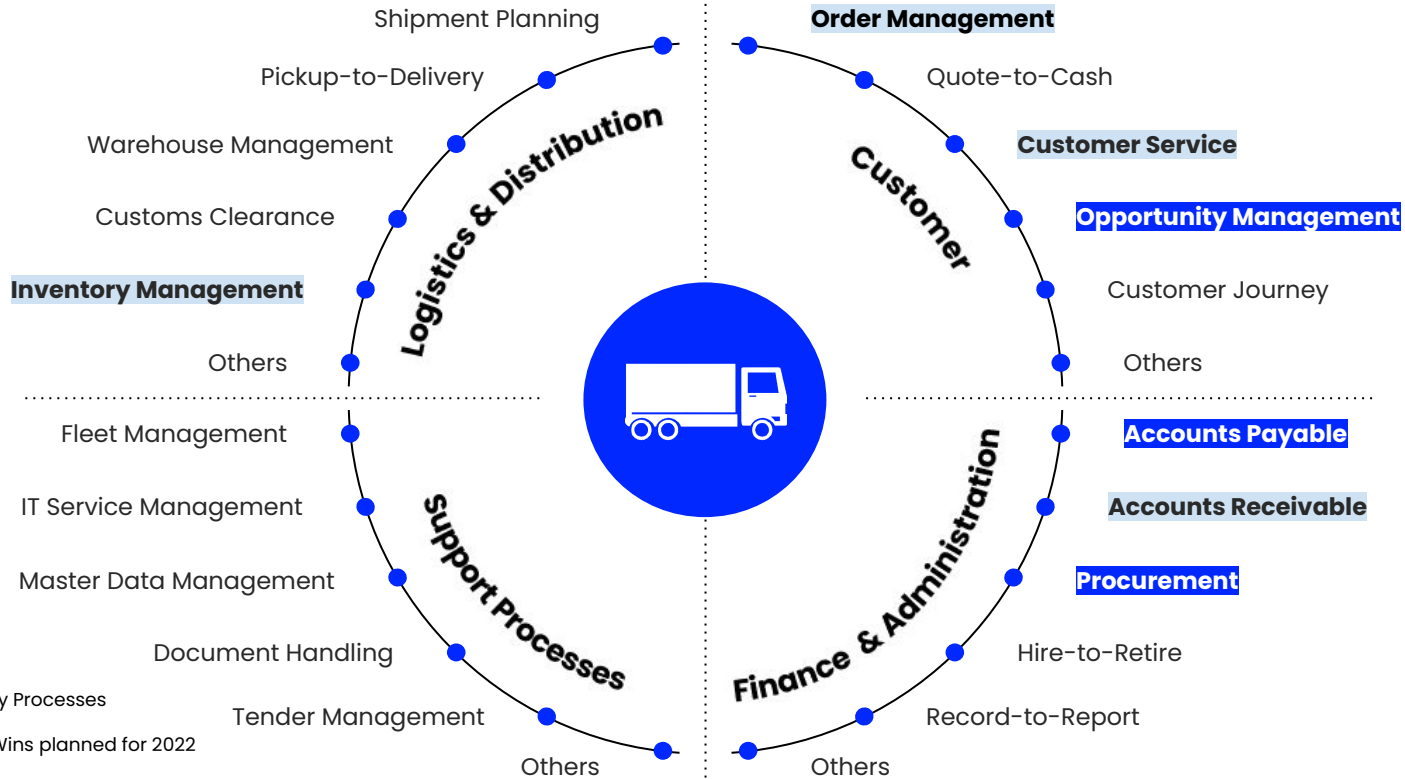
Objective 1: Productivity & Operational Excellence. Initiatives to improve labor productivity and reduce operational costs

Objective 2: Customer Experience. Initiatives to improve customer experience and satisfaction. Differentiate from competitors and improve NPS score.

Objective 3: Efficiency in Sales. Increase win deals numbers in the team, via a solid methodology and reducing administrative tasks.

Process Roadmap (Example: Logistics)

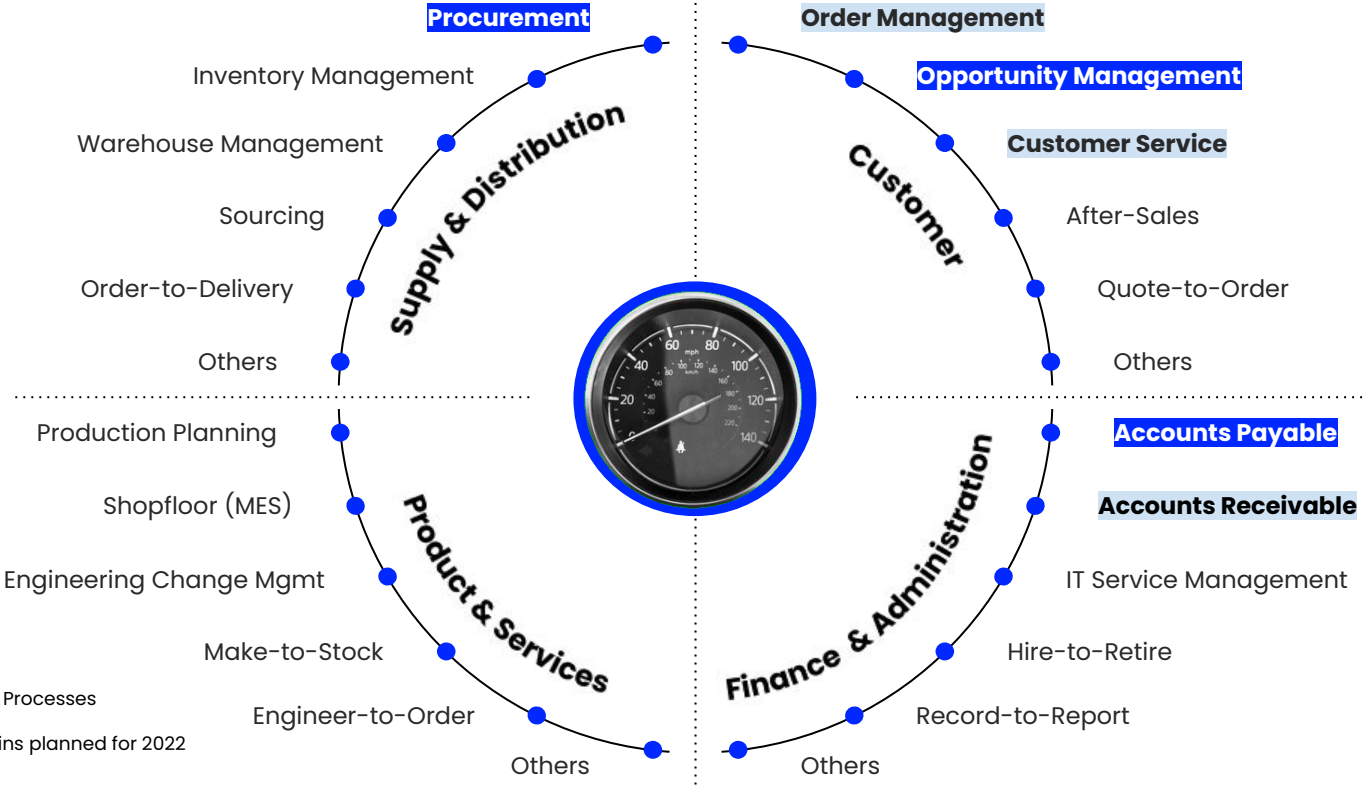
Example C



Process Roadmap (Example: Automotive)

Example

C



- Celonis Industry Processes
- Wave: Quick-Wins planned for 2022
- Planned 2023

Value Plan

A first Value Plan, consist in the definition of the following topics



Business Objective and Use Cases

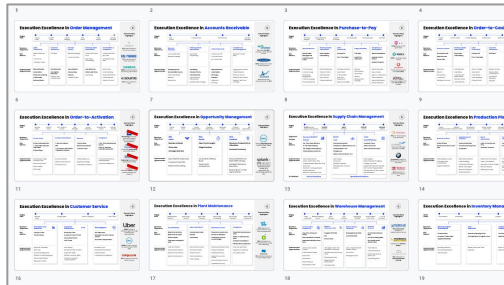


1.- Find your processes from Celonis Value Trees

Value Trees: [HERE](#)

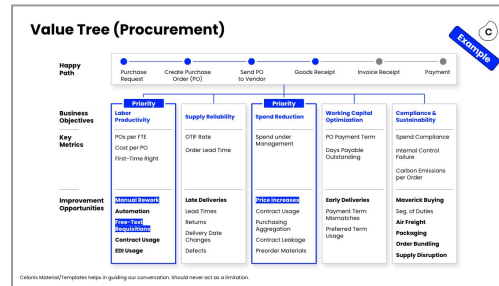
Find your Value Tree (Value Trees contain the most common Use Cases per process)

Update your Value Plan by copying and pasting your Value Tree.



2.- Select your Business Objective

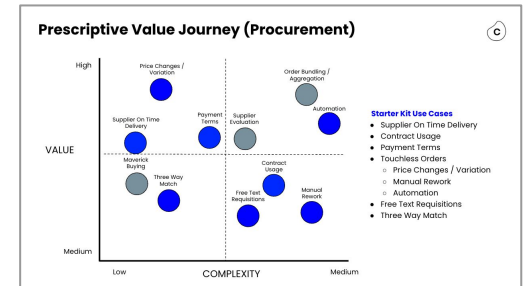
The objective/s selected should be **aligned to the company's strategy**. You may prioritize more than one pillar.



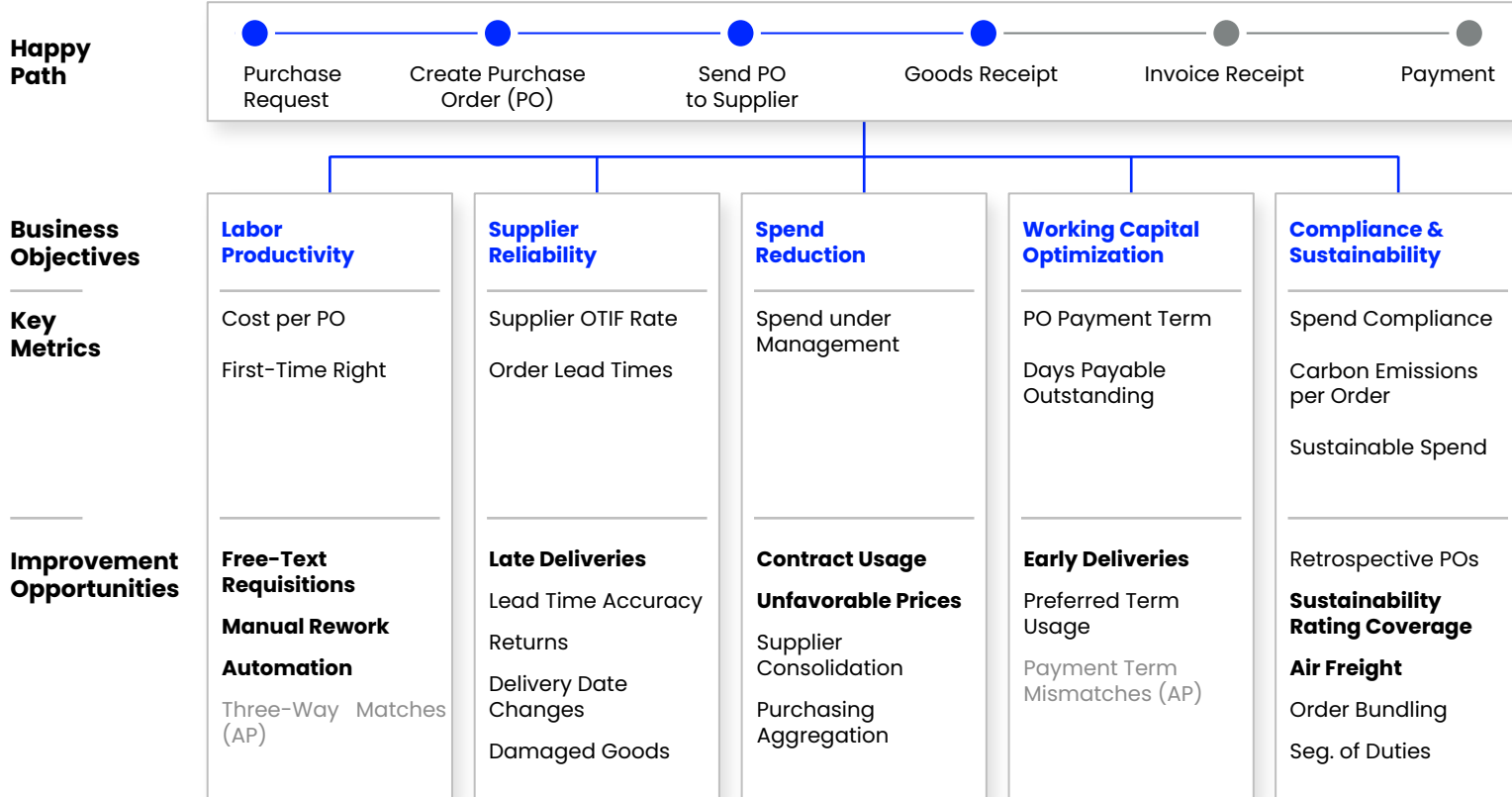
3.- Select the Improvements Opportunities (Use Cases)

Mark in **blue** the improvements Opportunities (Use Cases) where you believe there is potential for improvement.

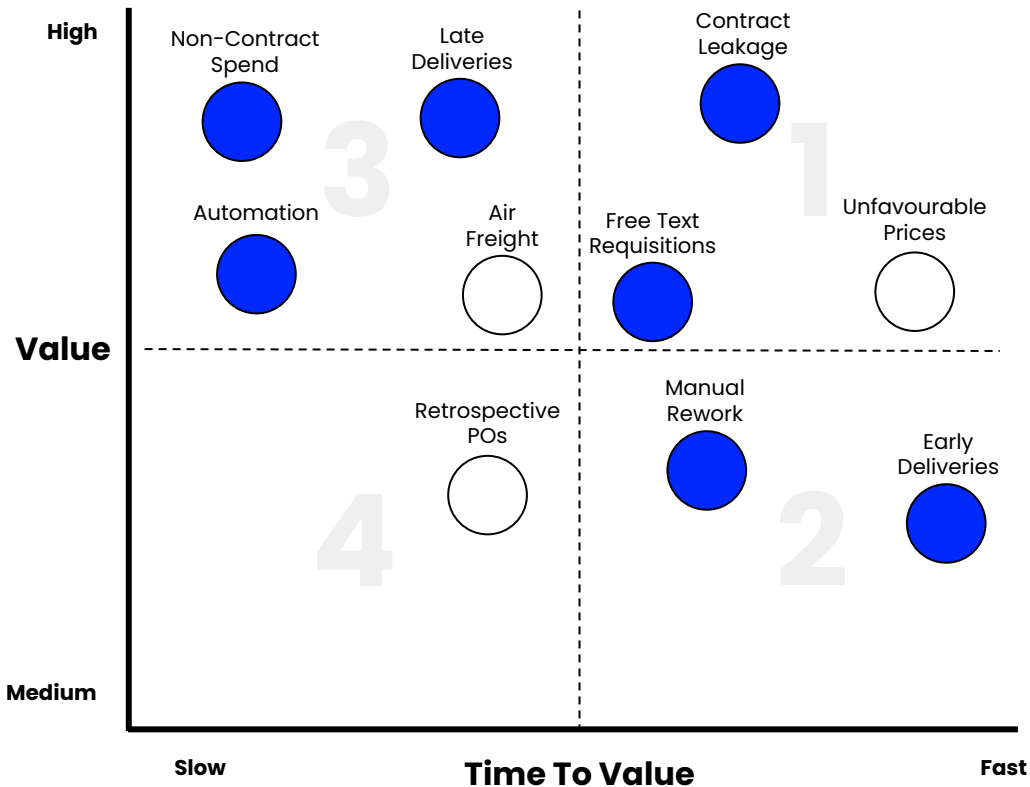
Prescriptive Value Journeys: [HERE](#)
Offers a prioritisation guideline based on complexity to realize value.



Execution Excellence in Procurement



Value Journey for Procurement



Recommended Journey

1 – Gold Nuggets

- Contract Leakage
- Free-Text Requisitions
- Unfavourable Prices

2 – Low-hanging Fruit


- Early Deliveries
- Manual Rework

3 – Big Bets

- Late Deliveries
- Air Freight 
- Non-Contract Spend
- Automation

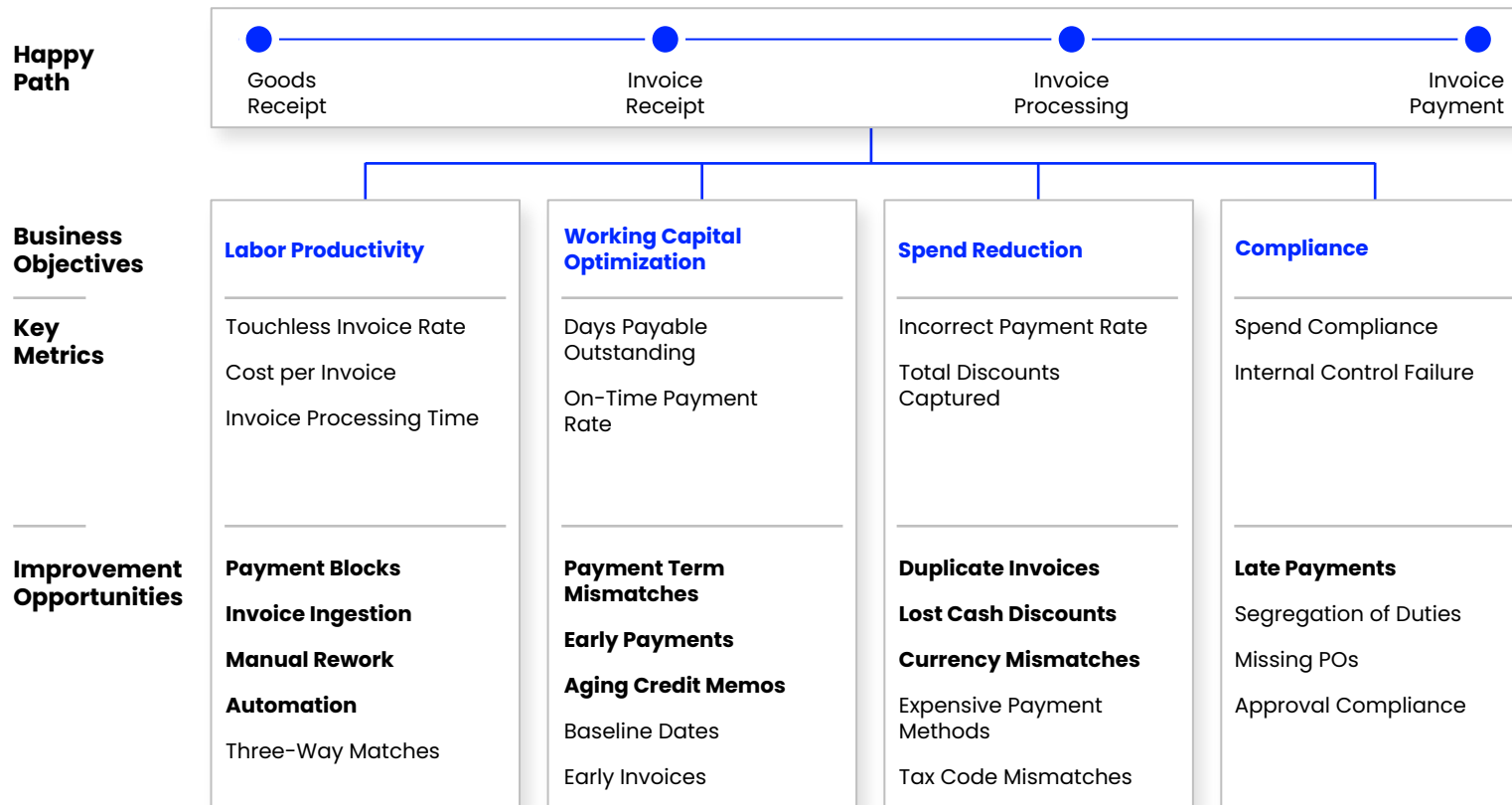
4 – Long-term Projects

- Retrospective POs (“Maverick Buying”)

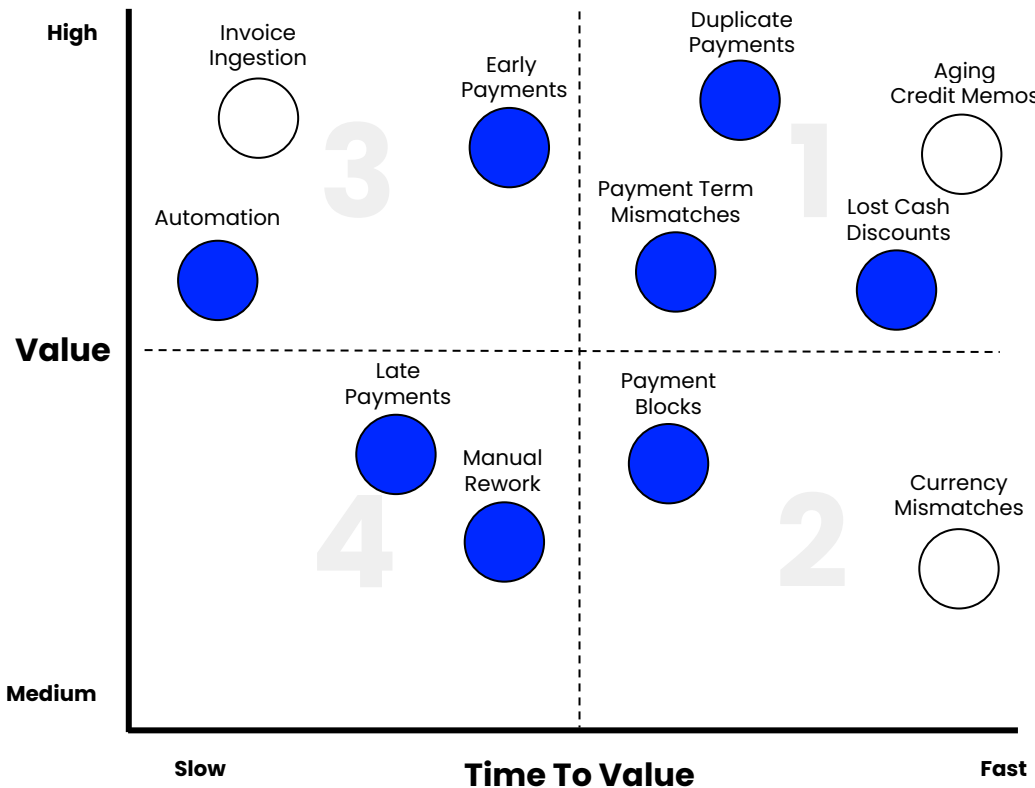
 Included in Starter Kit & Business Miner

 Additional Green Line Impact

Execution Excellence in Accounts Payable



Value Journey for Accounts Payable



Recommended Journey

1 – Gold Nuggets

- Duplicate Payments
- Aging Credit Memos
- Lost Cash Discounts
- Payment Term Mismatches

2 – Low-hanging Fruit

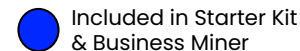
- Payment Blocks
- Currency Mismatches

3 – Big Bets

- Early Payments
- Invoice Ingestion
- Automation

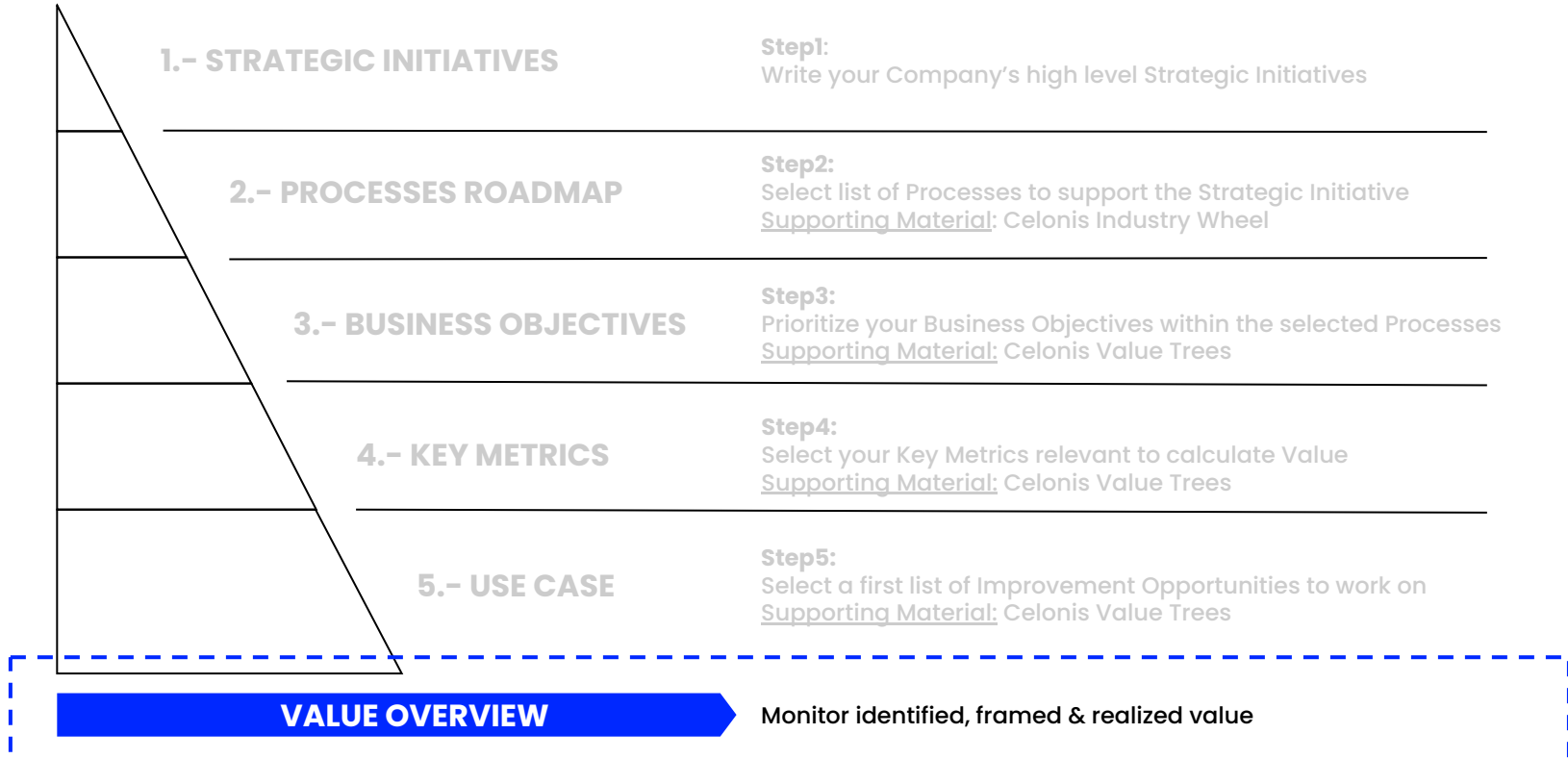
4 – Long-term Projects

- Late Payments
- Manual Rework



Value Plan

A first Value Plan, consist in the definition of the following topics



Business Objective and Use Cases

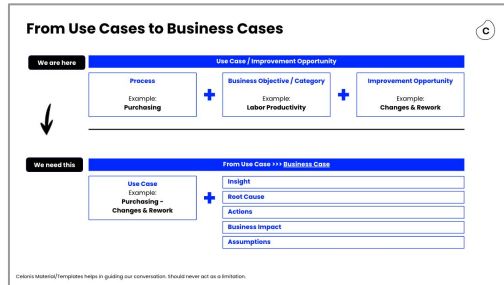


1.- From Use Case to Business Case

From the selected Use Cases, you will need to confirm that there is actually a **real business case behind**.

Business Case Template: [HERE](#)

It is recommended to create a “One Page” Business Case and add it to your Value Plan. (week 2 session will focus in this)



2.- Document your Use Cases Backlog (by Process)

Before we start using Celonis. It is recommended to document the of Use Cases. Even if you don't know yet the value impact behind each use case.

Update Value Plan

This is an ongoing work. This is just a starting point.

The table shows the value overview for purchasing, including KPI progress and value realization. A blue 'Example' label is in the top right corner.

Objective	Improvement Opportunity (KPI)	KPI Progress			Value Progress	
		Start	Target	Current	Identified	Realized
Labor Productivity	Changes & Rework, Rework and changes cause significant manual effort. Resolve root causes such as outdated master data to increase labor productivity.	VS.	VS.	VS.	\$-	\$-
Working Capital Optimization	Early Deliveries, Minimize the impact of early deliveries on your working capital by automatically delaying tentative orders for affected processes.	VS.	VS.	VS.	\$-	\$-
TOTAL					\$-	\$-

Celonis Material/ Templates helps in guiding our conversation. Should never act as a limitation.

3.- One Pager Overview of the Value Identified and Realized

Many initiatives may be happening in parallel, it is recommended to show the total value (including all processes you may be working on)

Update Value Plan

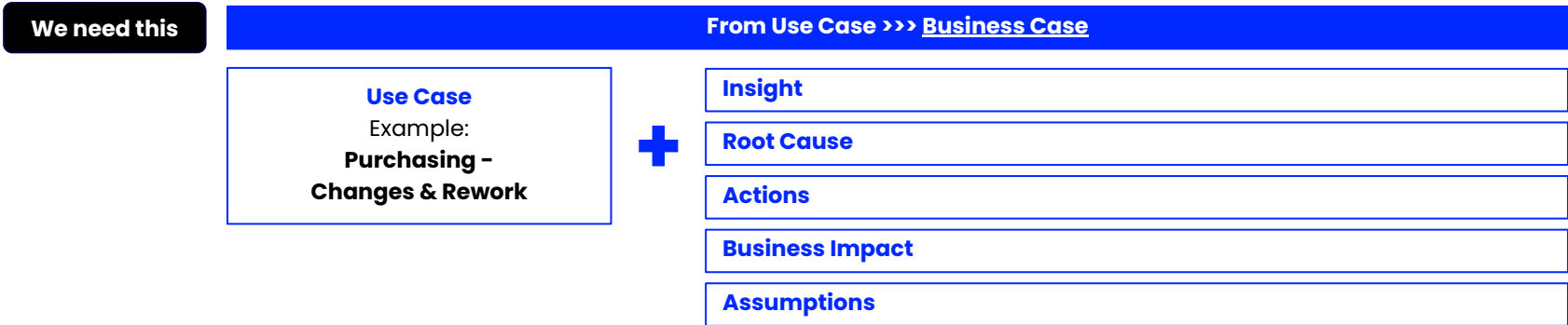
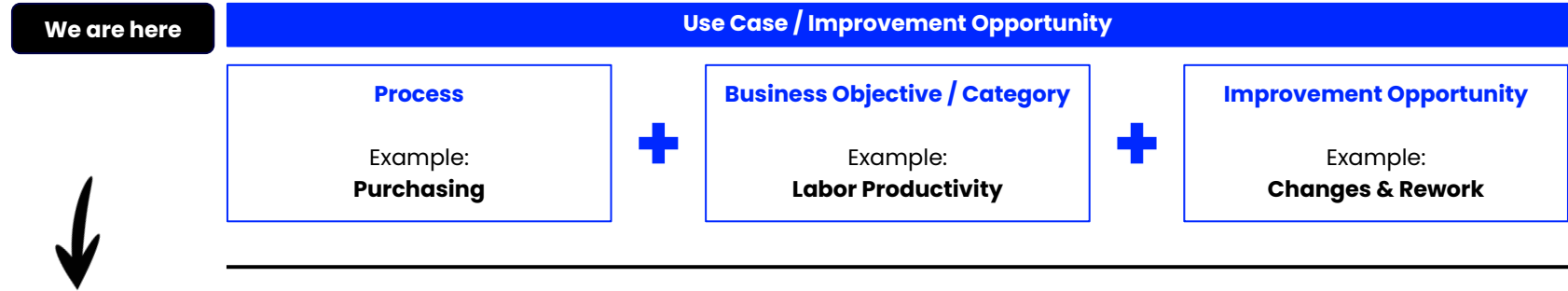
This is an ongoing work. This is just a starting point.

The table shows the total value overview, comparing identified and realized values across different categories. A blue 'Example' label is in the top right corner.

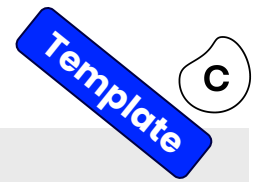
	\$xxM Total Value Identified	\$xxM Total Value Realized
Purchasing	\$xxM - Identified \$xxM - Realized	\$xxM - Identified \$xxM - Realized
Accounts Payable	\$xxM - Identified \$xxM - Realized	\$xxM - Identified \$xxM - Realized
Opportunity Management	\$xxM - Identified \$xxM - Realized	\$xxM - Identified \$xxM - Realized




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From Use Cases to Business Cases

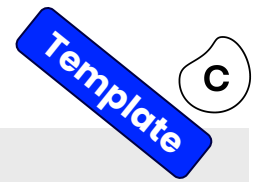





Business Case Template



	Insight	<p>Describe the Inefficiency How much is happening And if we see a potential root cause, highlight it</p> <div data-bbox="867 188 1307 469" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>(optional) ScreenShot of the Process Inefficiency</p> </div>	Volume	<p>How much is the Inefficiency happening</p>
	Actions	<p>Describe Actions / Solutions that could be applied (using Celonis features or not) to tackle the identified Inefficiency</p>	Business Objective	<p>Business Objective (from Value Tree)</p>
	Business Value	<p>Write the Formula and final Business Impact Calculation</p>	Realization Potential	<p>% we can reduce from total volume</p>
			Assumptions	<p>Assumptions</p>
			Business Impact	VALUE in €

Business Case Template



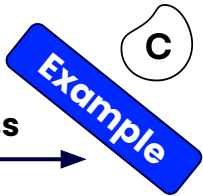
	<p>Insight</p>	<p>Procurement – Manual Rework</p> <p>Rework and changes cause significant manual effort. Resolve root causes such as outdated master data to increase labor productivity.</p> <p>In 2021, a total of 150,000 manual action were taken due to a rework . Outdated master data, entry errors, and undesired vendor behavior require rework and changes after an order has been created.</p> <p>Celonis Studio and Smart Root Cause Analysis highlight frequent changes related to specific materials or vendors.</p>	<p>Volume</p>	<p>150,000 Cases in 2021</p>
	<p>Actions</p>	<p>Removing repeated manual tasks improves labor productivity, lowers throughput times, and increases employee satisfaction.</p> <p>Solutions: Action Flow Alert to Prompt Master Data Review</p>	<p>Realization Potential</p>	<p>50% Realization Potential</p>
	<p>Business Value</p>	<p>Business Value = $\frac{\text{Number of rework activities} \times \text{Avg. effort (min)} \times \text{Employee Cost (\\$/min)}}{\text{Realization Potential}}$</p> <p>Business Value = $150,000 \times 5 \times 0.5 \times 0.5 = 187,500 \text{ € of annual impact}$</p>	<p>Assumptions</p>	<p>55k€ Employee Salary 10 min per manual activity</p>
			<p>Business Impact</p>	<p>187,500 (€) Annual Impact Identified</p>

Value Overview (Purchasing)

Objective	Improvement Opportunity (KPI)	KPI Progress		
		Start	Target	Current
Labor Productivity	Changes & Rework. Rework and changes cause significant manual effort. Resolve root causes such as outdated master data to increase labor productivity.	x%	x%	x%
Working Capital Optimization	Early Deliveries. Minimize the impact of early deliveries on your working capital by automatically delaying baseline dates for affected invoices.	x%	x%	x%
TOTAL				

Value Progress

Identified	Realized
\$-	\$-
\$-	\$-
\$-	\$-

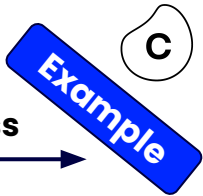


Value Overview (Accounts Payable)

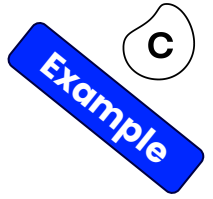
Objective	Improvement Opportunity (KPI)	KPI Progress		
		Start	Target	Current
Labor Productivity	Payments Blocks. Automatically resolve payment blocks by solving root causes.	x%	x%	x%
Spend Reduction	Duplicate Payments. Use machine learning to automatically detect and prevent duplicate payments in real-time.	x%	x%	x%
TOTAL				

Value Progress

Identified	Realized
\$-	\$-
\$-	\$-
\$-	\$-



Value Overview (Total)



\$xxM

Total Value Identified

\$xxM

Total Value Realized

Purchasing

\$xxM - Identified

\$xxM - Realized

Accounts Payable

\$xxM - Identified

\$xxM - Realized

Opportunity Management

\$xxM - Identified

\$xxM - Realized



Poll

Recap: Value Plan



Recap: Value Plan



1.- Strategic Initiatives

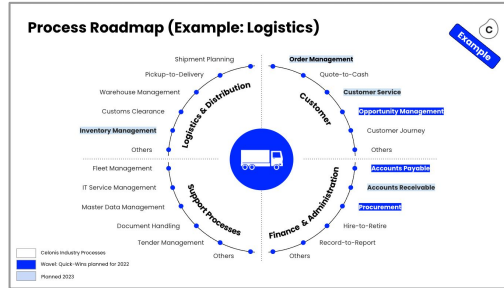
Strategic Initiatives

Company XYZ

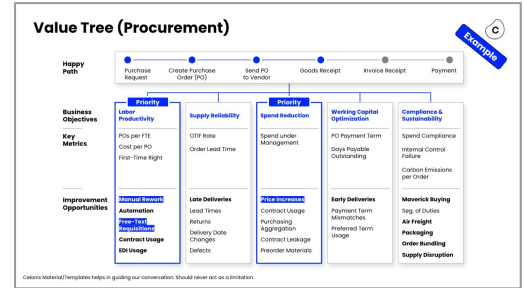
- Objective 1: Productivity & Operational Excellence.** Initiatives to improve labor productivity and reduce operational costs.
- Objective 2: Customer Experience.** Initiatives to improve customer experience and satisfaction, differentiate from competitors and improve NPS score.
- Objective 3: Efficiency in Sales.** Increase win disto numbers in the team, via a solid methodology and reducing administrative tasks.

Celonis Material/Templates helps in guiding our conversation. Should never act as a limitation.

2.- Process Roadmap



3.- Select Use Cases



4.- Business Case Definition

Business Case Template

Insight	Procurement - Manual Review Review and changes cause significant manual effort. Resolve root causes such as outdated master data to increase labor productivity. In 2023, a total of 5,000 manual action were taken due to a review. Outdated master data, entry errors, and unilateral vendor behavior requires review and changes after an order has been created.	Volume	5,000 Cases 2023
Actions	Solution: Action Flow Alert to Prompt Master Data Review	Business Objective	Labor Productivity
Business Value	Business Value = number of review activities * Avg effort (min) * Employee Cost (\$/hr) * Reduction Coefficient Business Value = 5,000 * 15 * 0.5 * 0.70 = 17,500 € Annual Impact Identified	Realization Potential	70% Realization Potential
		Assumptions	€50 Employee Salary, 40 min per manual activity
		Business Impact	17,500 € Annual Impact Identified

Celonis Material/Templates helps in guiding our conversation. Should never act as a limitation.

5.- Value Overview (by Process)

Value Overview (Purchasing)

Objective	Improvement Opportunity (KPI)	KPI Progress			Value Progress	
		Start	Target	Current	Identified	Realized
Labor Productivity	Changes & Review. Review and changes cause significant manual effort. Resolve root causes such as outdated master data to increase labor productivity.	x%	x%	x%	\$-	\$-
Working Capital Optimization	Early Deliveries. Minimize the impact of early deliveries on your working capital by automatically closing invoices states for affected invoices.	x%	x%	x%	\$-	\$-
TOTAL					\$-	\$-

Celonis Material/Templates helps in guiding our conversation. Should never act as a limitation.

6.- Value Overview (Total)

Value Overview (Total)

\$xxM Total Value Identified	\$xxM Total Value Realized	
Purchasing	Accounts Payable	Opportunity Management
\$xxM - Identified \$xxM - Realized	\$xxM - Identified \$xxM - Realized	\$xxM - Identified \$xxM - Realized

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Thank you.